



Source Selection Cliff Notes

County of San Diego
Winston F. McColl, Director, P&C
Bruce Petrozza, Contracts Manager

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Briefing Agenda

- The RFP Process
- Routine RFP
- Two Step(RFSQ, then RFP)
- Source Selection
- Evaluation Criteria



Purpose of Source Selection

- To select the best qualified offeror that will provide the "Best Value", price, and other factors for the work.
- The critical elements to success are:
- The RFP with its performance based Statement of Work,
- The SSC using the evaluation criteria established in the RFP



1. Routine RFP (One Step)

- Open to any offeror
- Potential for numerous proposals
- RFP is a time consuming process...don't get discouraged!
- Issue RFP
- Pre-Proposal Conference
- Review Proposals
- SSC (1): initial briefing, conflict of interest, receive proposals
- SSC (2): establish competitive range, orals, discussion/negotiations
- SSC (3) : BAFOs, selection of best value, recommendation to SSA
- Award

Time: Six to Nine Months due mainly to scheduling SSCs meetings.



RFSQ; RFP (Two Step)

- RFSQ...Request for Statement of Qualifications:
 - SSC reviews questionnaire
 - establish pre-qualified list
- Follow with Routine RFP

Bottom Line for RFP Process:

- Comprehensive Process
- Evaluates the proposal, not the offeror
- Follow your procedures
- Document, Document, Document, Document



2. Source Selection

Purpose: Selects Best Qualified offeror based on the proposal submitted. Source selection has several components:

- Source Selection Authority (SSA)
 - Senior person (Department Head or General Manager)
 - Selects the SSC chairman and members
 - Has authority to overrule the SSC
 - Responsible for overseeing the entire selection and evaluation process



Source Selection Committee (SSC)

- Led by a Chairperson
- Members
 - Voting (SSC members may be their own technical staff)
 - Non-voting
 - Technical (Staff, consultants)
 - Cost/pricing analysts
 - P&C support



How do they do it!

- Read the RFP...with its SOW and evaluation criteria
- Read all proposals
- Select the competitive range
- Hear oral presentations
- Conduct clarifications, discussions and negotiations
- Make site visits
- Write the report for the SSA to make a selection



Bottom Line

- SSC must know the SOW and evaluation criteria
- Be consistent
- Evaluate the proposal, not the offeror
- Document, Document, Document, Document



3. Evaluation Criteria

- Understand the evaluation sheet prepared for the RFP
- Know the “weighting” values for each criterion
- Compare proposal to SOW, not to another proposal
- Consider price
- Establish rankings
 - Unacceptable
 - Susceptible of becoming acceptable
 - Acceptable
- Establish Competitive Range



Questions that you have asked....

- Who should be called upon as technical experts? SOW team members; experts from other public sector entities?
- What role should experts play in the review eg. As-needed consultation, non-voting?
- Should we filter proposals for cost threshold (10%) before conducting technical review?
- How do you ensure proposals are “blind” so there is no preferential/negative treatment of employee proposal?



Cost Comparison Guidebook

- Have you developed a cost comparison guidebook that addresses
 - Avoidable costs
 - One-time costs
 - Transition
 - Employee benefits
 - Contract administration
 - Inflation



Considerations

- What considerations have been given to structuring your SSC to
 - Comply with the procurement
 - Communications with Council members
 - Briefings
 - Voting and non-voting members
 - IRB participation